

511 Traffic Focus Group Findings Report

Submitted by Wolfe/Doyle Advertising

I. Background

Three focus groups were conducted in mid-July, 2001, among Bay Area residents who commute to work by car. The purpose of the groups was to understand attitudes and behaviors related to traffic information usage, in general and with respect to the current 817-1717 phone service and the planned 511 service. These findings (and other learning) will be applied primarily to marketing communications planning and product development in preparation for the Bay Area launch of 511. A secondary application of these findings will be to planning the Web Portal, which will offer traffic information services as a key component.

II. Methodology

In total, four focus groups were scheduled -- two among commuters who use the 817-1717 service for traffic information ("users"), and two among commuters who are aware of traffic information phone services, but use other sources ("aware non-users"). Both groups among aware non-users were conducted as planned. However, only one user group was conducted because of difficulties recruiting users from the South Bay. Consequently, a second focus group among users will be conducted in an alternate location, and the findings in this report will be revised if and as needed.

Of the three groups completed, two were conducted in Berkeley among Alameda and Contra Costa County residents, and one was in San Jose among San Mateo and Santa Clara County residents.

Each focus group had six participants. All participants met the following criteria:

- Aged 25-54
- HHI \$65,000+
- Employed full-time or self-employed
- Commute by car daily, 20 minutes or more each way
- Do not commute by vanpool/carpool or motorcycle
- Own and use a mobile phone
- Men and women were recruited at a 2-to-1 ratio
- "Users" had used 817-1717 at least once in the past 30 days
- "Aware non-users" had not used 817-1717 within 60 days prior to being recruited; after recruitment, they were asked to use the service daily for a week prior to the focus groups

The criteria for recruiting participants were established on the basis of usage demographics revealed by annual 817-1717 marketing surveys, as well as on the basis of target audience discussions with MTC management and its agencies.

The focus groups agenda was structured to cover four key areas of discussion:

- Category definition, salience, and options -- A topline discussion of how participants define traffic information, their options for this type of information, and how they choose between those options.
- 817-1717 as an option -- A discussion of the factors that encourage or discourage trial and usage of 817-1717, including reactions to advertising and likes/dislikes about the service.
- Usage occasion/relevance -- An exploration of the specific factors that trigger awareness and usage of any/all sources of traffic information, with emphasis on how these triggers may vary, and how strong they are.
- 511 as an option -- A group exercise to "build" an ideal traffic information service, to see how many features or benefits of 511 would arise spontaneously. This was followed by a review, evaluation, and discussion of 511 features and benefits, and a brief exercise to explore perceptions of what types of people would/would not be likely to use the service.

Specific questions and all group discussions were recorded on videocassettes, which will be made available to MTC. The moderator's guide is attached (Attachment A).

III. Findings

1. Category Definition, Salience, and Options

Definition -- Respondents defined "local traffic information" as information about anything that impedes traffic, specifically: general congestion, incidents (accidents, stalls), construction, major events, and transit strikes. Some respondents expect a traffic information service to provide this type of information for both highways and streets, and to suggest alternate routes.

Salience -- Traffic information seems most top-of-mind and important when heavier traffic is expected, most notably: Friday afternoons, Monday mornings, whenever it's raining, and during games/concerts/events (especially on weekends). Traffic information also becomes salient whenever brisk traffic suddenly slows or stops for no apparent reason.

Respondents seemed fairly unanimous that Friday afternoon traffic is particularly heavy, due to commuter traffic sharing the road with people driving to Tahoe -- especially during ski season ("*SUVs all over the place.*"). Among transplants to the Bay Area from outside California, there also seemed to be a shared sense of humor about how unaccustomed local drivers are to bad weather, and how even a light rain can bring traffic to a crawl. A third area of agreement was that weekend traffic is surprisingly heavy in the Bay Area ("*I've never lived in a place that has more weekend traffic.*").

Options:

a) Radio was the most popular source for traffic information, primarily because it's the best option for receiving traffic updates almost as quickly as incidents and backups occur. The common perception among respondents was that radio updates are provided as often as every 10 minutes (KCBS), and usually that's frequently enough to satisfy one's need for information. A second perceived advantage to radio is that stations receive traffic input from listeners who call in on their cell phones, which greatly increases a station's ability to learn about incidents as they occur.

Radio information wasn't seen as perfect, however. One perceived drawback is that radio doesn't *always* deliver timely, accurate information. Sometimes, the listener's route is left out of a report, or the listener is experiencing different traffic conditions than the station is reporting. Some respondents mentioned that traffic descriptions are inherently subjective, and that what one reporter may describe as "heavy", another may describe as "moderate".

b) The phone was seen as the next best source for traffic information, and this seemed true among 817-1717 users as well as aware non-users.

Some respondents mentioned good experiences calling CHP, even though they felt a little guilty that their calls might be "distracting" phone dispatchers from more urgent matters. The favorable aspects of these calls were the courtesy and promptness with which

information was provided, as well as the perception that CHP has a "vested interest" in particularly accurate and timely traffic information and road conditions.

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Other respondents mentioned having a traffic reporting service programmed into their cell phones (Verizon was mentioned, but it was unclear what role they played in enabling or providing the traffic information).

A few mentioned calls between family members or friends, in which one person hears a traffic report (on the radio or TV) and calls another person who is travelling, or about to travel, the affected route.

Respondent reactions to the 817-1717 service are covered in Section "2" of this report.

c) Television -- Some respondents said they like to "see" traffic conditions on TV traffic reports. However, practically none said they rely on TV as a single or primary source of traffic updates because of the time lapse between leaving home and reaching their destination. Such time lapses were seen as long enough for traffic to change considerably.

d) Online was not seen as a good choice for current traffic conditions, which was clearly the most important category of information. As with TV or any home-based medium (even the home phone), the time lapse between leaving home and reaching one's destination is too great, given how quickly traffic conditions can change. (Worth noting is that respondents did not mention wireless internet access at this point; some mention was made during the subsequent "ideal" traffic information service exercise, discussed in Section 4.)

However, online *was* seen as a good choice for personalized trip planning within the Bay Area. Respondents felt that when they need to arrive at an unfamiliar destination by a specific time, especially for work-related meetings, online trip planning is very useful. Respondents said they rely on services like Mapquest for driving directions and maps, and that they tap these sources a day or more in advance.

At this point in the focus groups, and later in the "ideal" traffic information service exercise, respondents suggested that online trip planning could be enhanced by access to estimated travel times. Further, they suggested that these estimates be based on historic averages for specific days and times.

2. 817-1717 As an Option

a) Reactions to the billboard ("55% of all callers change their commute plans") were similar among users and non-users: both types of respondents felt that the billboard is too

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vague about what the 817-1717 service is. They felt the billboard should come right out and say "traffic information" or "traffic updates."

Also, the claim regarding "55% ... change their commute plans" was not perceived as a personal benefit. Some respondents were suspicious of such a high percentage, but mostly the respondents felt that what other people do with their commute plans isn't as important as the basic knowledge that there's a phone service for traffic updates.

b) Reactions to the 817-1717 service seemed to range from mildly favorable to mildly critical. Among aware non-users who had been asked to try the service daily as a "homework exercise" prior to the groups, the most common criticisms were frustration with complex menu choices, and too little information about their selected route.

Aware non-users seemed unwilling to repeatedly navigate the menu choices because the resulting information was generally not worth the effort. They seemed let down or unfulfilled when they tried 817-1717 and heard the recorded voice say: "At this time, there are no incidents reported on ...". Comments ranged from *"I just don't feel like it provided enough pertinent information"* and *"Doesn't have enough information -- unless it's a big accident"* to *"KCBS gives you the juicy details, but 817-1717 doesn't"*.

In discussion, aware non-users agreed that instead of hearing "no incidents", they'd prefer hearing "positive" information, such as "there's no waiting at the Bay Bridge Toll Plaza". One respondent suggested that *"If a particular commute happens to be going very well, that information is also useful."* Another respondent wanted to know the speed of traffic on selected routes, not just whether an incident was reported. In general, these respondents seemed to need a mental picture of what their commute would be like, but found such a picture hard to create based on terse updates or reports of "no incidents".

As mentioned, both users and aware non-users found the 817-1717 menu "frustrating". Comments included: *"You can get lost in the menu"*, *"A couple of hiccups in the beginning because it's a pretty elaborate menu"*, *"It's too complicated to get ongoing info by cell phone"*, *"I got frustrated by the menu choices"* and *"What I don't like is you keep punching numbers"*.

Logically, users seemed more accustomed to the phone menu than non-users, but still felt that punching in numbers while driving is always difficult and potentially hazardous. Both users and non-users seemed very conscious of public safety concerns about cell

phone usage while driving, and that punching in numbers is more dangerous than talking. Hence, 817-1717 usage evokes a sense of inconvenience as well concerns about safety.

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One respondent astutely pointed out that 817-1717 is particularly hard to use in the East Bay, where even relatively short commutes can involve rapid interchanges between 580, 980, 880, and 80 -- while the user tries to keep pace by punching in numbers for each highway.

Without prompting, respondents discussed ways to make 817-1717 more convenient. Their ideas included: "*3-digit dialing*" to access the service more easily; "*voice activation*" to make the phone menu easier to navigate; "*Caller I.D.*" or the use of a PIN to access personalized traffic reports; and "*push technology*" that notifies you via pager or email of incidents along your commute.

Regarding the Caller I.D., PIN, and push technology suggestions, respondents were interested in a set-up process, either online or over the phone, that would allow them to pre-register their daily commute route(s). Once registered, they would no longer have to enter route information each time they used the service. The service would "know" what personalized information to serve on the basis of the user's pre-registered phone number, PIN, pager number, or e-mail address. These suggested enhancements to the service seemed primarily motivated by a need for convenience (instead of safety). As one respondent summarized, "*People don't want to go out of their way for information.*"

Favorable comments about the service focused on the fact that "*it's always there, so it's reliable*" and "*you don't have to wait.*" One respondent mentioned that the service seems like it would be a good way to get more detail on an incident reported on the radio. Another mentioned that they liked hearing a real person's voice, as opposed to a radio deejay or traffic reporter. Several of the users reported that, on occasion, they call the number 2-3 times within a commute to check the status of an incident or major back-up.

3. Usage Occasion and Relevance

This portion of the discussion focused on how people feel during various commutes, and what happens during those commutes that might stimulate a need for a specific type of traffic information.

a) The morning commute -- Some respondents reported feeling tense and rushed in the morning, while others said they feel relaxed or upbeat. The difference seemed to be based on whether the respondent has much control of their morning schedule. Those who could usually decide when to arrive, and could schedule meetings around their needs,

seemed more relaxed about their morning commute. Conversely, those with little control over meetings, or other obligations requiring a fixed arrival time, seemed to feel more stress.

Respondents who feel stressed in the morning said they get very "antsy" in unexpectedly slow or stopped traffic. An alarm seems to go off in their heads: they wonder what happened, how long will I be delayed, should I call work, and what should I say? If the person in this situation just missed a radio traffic report, the 5-10 minutes until then next report can seem like a long time. They need to make decisions and communicate them, if necessary, but feel trapped by a lack of information. At times like this, it seems like the most urgent need is to accurately re-estimate their arrival time.

Respondents who feel relaxed or upbeat during their morning commutes seemed to want to avoid having those positive feelings altered by rude and unlawful drivers. They expressed feelings that commuting should be a communal, cooperative experience, and are happy when it is. Describing when this happens, one respondent jubilantly exclaimed "*Wow! I had an (expletive)-free commute!*" Another summarized the group's feelings by saying that Bay Area highways are "*not a place for individualism.*"

These "relaxed" commuters seemed less upset by unexpected delays and less in need of traffic information to re-estimate their arrival time. However, they *did* seem to want a means of encouraging cooperation and civility among commuters. Ideally, this role should be played by the Highway Patrol, but respondents felt that law enforcement can't contain outright traffic violations, much less encourage safe, courteous driving. Using the phone to report violations or overtly rude, hazardous drivers was a subject that arose spontaneously in this portion of the discussion. Although respondents didn't seem inclined to use such a resource frequently, some seemed to want the option. Moreover, they seemed to want an official, protective "ally" to promote safe, courteous, stress-free driving -- especially on fast-moving and "aggressive" commutes like the San Tomas Expressway.

b) The evening commute -- Respondents seemed to feel somewhat differently about their drive home than their drive to work. Generally, they seemed less stressed in the evening, but many said they felt tired and were eager to get home and relax. Unexpected traffic seemed to raise their anxiety, as it prolonged their battle with fatigue.

Surprisingly, no one indicated any particular stress about unexpected traffic interfering with family obligations. Perhaps this shows that family members are more flexible about traffic delays than workplaces.

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c) Weekend driving -- All groups noted that weekend traffic is a problem in the Bay Area. They seemed surprised at how bad it has gotten, and try hard to avoid the incremental weekend traffic that accompanies major sporting events, concerts, and shows. Since weekend travel rarely requires the same hard arrival times as a weekday morning commutes, respondents were less interested in knowing how long they might be delayed. Instead, they seemed to want advance warning of an event, so that they could avoid travelling while event-related traffic was heavy, or consider a less congested route.

d) Other driving occasions -- As previously mentioned, particularly heavy traffic is expected throughout the Bay Area on any rainy day or Friday afternoon. At these times, respondents said they simply brace themselves for the worst, and pay particular attention to traffic information. No one particular type of traffic information seemed particularly salient on these occasions, with the exception of road conditions over the Sierra -- which would benefit Friday afternoon commuters who plan to drive to the Tahoe that evening.

4. The Ideal Traffic Information Service

Discussion of an ideal traffic information service was prompted by an exercise in which respondents were paired and asked to collaborate on conceptually building a service from scratch. They were encouraged to focus on what would be ideal for them, and disregard practical considerations about feasibility.

Not surprising for the Bay Area, respondents built their ideal traffic information services with handfulls of technology, utilizing combinations of satellites, GPS systems, in-dash screens and chip boxes, databases, analytic software, wireless internet, stationary big-screen monitors, mobile roadside monitors, roadside sensors, video cameras, traffic-dedicated radio broadcasting signals, mobile phones, voice recognition, and Caller ID.

Although there were as many permutations of technology as there were respondent teams, almost all combinations seemed to deliver most or all of these benefits:

- a) You do not input where or who you are; the system knows automatically
- b) The service lets you accurately picture the current traffic along your route
- c) An alert system is built in
- d) Decision-making intelligence is built in

Looking at each of these desired benefits in more detail:

a) You do not need to input where or who you are -- Most of the respondents knew of GPS technology and would like to see it used to automatically and accurately identify a traffic information user's location. They anticipate that GPS systems will be factory-installed in many makes of automobiles, and it seemed logical that these systems could and should interface with traffic information services.

Some respondents coupled the convenience of not having to "tell" a system their location with the related convenience of not having to select route-specific information. This could be accomplished by technologies that could automatically transmit a user-identifying signal to the service, retrieve the user's pre-established travel profile, confirm where the user is, and provide customized information for the remaining portion(s) of their commute.

In short, most respondents invented automated systems that relieved them of ongoing involvement in the information selection process. Those who did not invent fully automated systems at least opted for voice activation, so that they could talk through the information selection process instead of conduct it manually.

b) The service lets you accurately picture the current traffic along your route -- There were two key aspects to this benefit: "accuracy" and "picture". These aspects were seen as related in that visual depictions of traffic are inherently more accurate than verbal descriptions. However, the technological components of each aspect differed...

"Accuracy" derived from the density and multiplicity of traffic measuring technologies. Given perceptions that "*sensors are cheap*" and "*cameras are everywhere*", respondents believed a traffic information service should make extensive use of these devices, in addition to traffic helicopter surveillance and eyewitness reports from mobile phone users, CHP officers and CalTrans personnel. The more sources of input, the better, especially if technology is applied to effectively integrating, analyzing and disseminating such input.

Regarding extensive use of cameras, discussions did not tend to touch on privacy issues. To the extent that privacy was discussed at all, the respondents involved seemed to feel that traffic cameras would not be invasive. Although they imagined some types of

cameras could "see too much", they assumed that those used for traffic would be sanctioned by government transportation agencies, and therefore limited to wide-angle shots of traffic. The use of cameras for high-resolution close-ups on car occupants would definitely be seen as invasive, but seemed very unlikely.

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The ability to "picture" current traffic conditions involved the application of screens or display technologies. Respondents wanted dashboard screens factory-installed in their cars, and/or large screens positioned along the highways. The highway screens could be massive and fixed, like the Jumbotrons at stadiums, or scaled down to the size of CalTrans' current mobile messaging displays. In either case, the visual would be a representation of upcoming traffic conditions -- well beyond the driver's line of sight. The representation could be actual, such as from a camera's point of view, or a graphic that uses colors, symbols, and possibly animation to convey current traffic densities, speeds, and incidents.

The consistency with which respondents built visual media into their ideal service indicates that traffic conditions are more easily processed as pictures than words. This was also indicated in earlier discussion, when the 817-1717 updates were described as overly terse -- it seemed that respondents had to work hard to convert this information into a complete mental "picture" of traffic.

c) An alert system is built in -- Many respondents wanted to have the choice between actively monitoring traffic information, or tuning out and letting an alert system bring them back into monitoring mode as needed. In either case, it seemed important to never be completely out of touch with traffic information.

d) Decision-making intelligence is built in -- Most of the services that respondents built included a database and analytic capability that could provide intelligence to help the user make decisions. The most common example was "estimated time of arrival" information, based on the user's current location, destination and current traffic conditions. Another example was trip-planning information -- specifically, how long it usually takes to travel from any given point A to point B, on any given date, and at any given time.

These types of information would help users decide whether and how to re-arrange appointments or make other contingencies for delays, as well as to determine an appropriate departure times for upcoming trips. As previously mentioned, respondents also wanted a service to recognize imminent events in the Bay Area, and issue advance warnings.

5. 511 Features

a) What does "511" convey? -- This portion of the discussion began by briefly exposing a board with the numbers "511" printed on it. Respondents were asked what came to mind.

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Most respondents immediately associated the number with 911 and 411 services. Accordingly, they anticipated that 511 was a phone number for receiving information or assistance of some kind. Some guessed it was an alternative to 911 for lesser emergencies. Others associated it with a number to call for phone trouble. A few associated it with area codes or radio stations.

b) Ranking of 511 features -- Respondents were then given a set of seven features describing the Bay Area's planned 511 service, and were asked to rank and discuss the importance of these features (see Attachment B).

Of the seven features, six were ranked an average of 4.2 or higher on a scale where "1" was "not at all important" and "5" was "extremely important". Note that since this was qualitative research, figures such as these represent the thinking of the focus group respondents, and should not be projected to a larger group without a quantitative survey. However, what these findings indicate is that respondents felt the service *overall* was very important.

The leading feature was that 511 would "report the current level of congestion along your route, and estimate the travel time to your destination." This was ranked an average of 4.9 and selected as "most important" by 44% of respondents. Respondents favored this feature because traffic conditions vary so much, prompting them to frequently and urgently want to know when they're likely to arrive at their destination.

The second leading feature was "voice-activated; you will be able to speak the options you select instead of pressing numbers." This was ranked an average of 4.6 and selected as "most important" by 39% of respondents. Respondents felt this feature was important primarily because it improved safety, and secondarily for its convenience.

The third leading feature was that 511 would "use new technologies to provide more complete, timely information about incidents and slowdowns along your route". This was ranked an average of 4.7 and ranked "most important" by 11% of respondents.

The corresponding rankings for remaining features were: "Toll free within the Bay Area" (4.5) (6%); "A 3-digit phone number to dial: 511" (4.2) (0%); "The 'menu' of options to select from will be improved" (4.2) (0%); and "The service will include Bay Area weather information" (2.7) (0%).

c) Who would use the new 511 service? -- As a wrap-up exercise, respondents were given a sheet depicting men and women from 12 different occupations and lifestyles, and were asked to indicate which of the people shown were "most likely to use the new 511 service."

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Respondents could select as many or as few people as they felt appropriate. All the men and women depicted were from the same 25-54 age group as the respondents, and were chosen to represent the same approximate household income range (\$65,000+ HHI). A range of professions and lifestyles was represented (listed below).

The primary purpose of the exercise was to see how narrow or broad respondents would be in their selections. A secondary objective was to see if any common demographic themes seemed to emerge from their selections.

On average, respondents chose 7 out of 12 people as "most likely users" of 511. This indicates that respondents perceived 511 as having fairly broad appeal and utility. Almost all respondents selected women in roughly equal proportion to men, indicating that the 511 service was not perceived as gender-oriented.

In total, respondents over-selected professions that seem to require more rigid daily work schedules and broader collaboration, and under-selected professions and lifestyles that offer a less rigid daily schedule and more independence.

The results of this exercise were as follows: female HR Director (selected by 89% of respondents; male architect (89%); ethnic male software engineer (89%); female TV producer (89%); male CFO (83%); working mom (83%); male lawyer (61%); ethnic male digital artist (56%); male Sierra Club member (56%); male Stanford professor (50%); female model (33%). Again these numbers reflect the assessments of the respondents and should not be projected to a larger group.

6. Other Findings

Two incidental findings are worth noting.

First, respondents were not very concerned about who is the provider of a new traffic information service, so long as the information is accurate. Traffic information did not seem to be an area in which "brands" or specific providers are a decision-making reference point.

Second, several respondents were willing to pay a fee for the new 511 service. However, they felt that for such services to serve the public good, they should be free or

inexpensive enough for most people to afford. Accordingly, they felt that the involvement of a transportation agency would be important to assure public funding (in addition to good placement of traffic measuring technologies, and no advertising on the 511 service).

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IV. Assessments and Implications

1. Positioning

- Consideration should be given to positioning 511 phone service in relation to radio traffic updates -- The focus groups made clear that radio is the target's the first choice for traffic information. To encourage trial of 511, the service must be seen as either a complement or better alternative to radio. Said another way, the target's decision to change behavior (to try 511) needs to be based on a re-evaluation of current behavior (listening to radio updates). People who depend on radio traffic updates are otherwise unlikely to re-evaluate their current behavior, because in general they seem quite satisfied with it.

One option to explore in future research is to position 511 traffic reports as a complement to radio updates. People who listen to radio traffic reports would be encouraged to call 511, as needed, to get more detail on an incident that was just reported, or to find out about slowdowns or stops that occur in-between reports. Such an approach could re-cast the old phrase "stuck in traffic" to a new phrase "stuck in-between traffic reports."

The other option -- to position 511 as a better alternative to radio updates -- might make sense if there are a number of local radio stations that do *not* offer frequent traffic information. Some stations may minimize or omit traffic updates, viewing them as intrusions (classical music stations, for example). If this is the case, such stations might endorse 511 as a way of keeping their listeners from defecting to more traffic-oriented stations whenever there's a major back-up. Listeners might endorse 511 for the same reason, in that some might prefer uninterrupted entertainment and -- if a traffic report is needed -- not having to change stations in search of an update (they could just dial 511).

The complementary approach might be more realistic. Since radio offers entertainment that people are habituated to and probably will never abandon, it's unlikely they will ever stop listening to radio and therefore hearing radio traffic updates. Also, a complementary approach would be less likely to alienate radio stations that we may need to depend on for 511 media buys.

To further evaluate these options, we should document which local radio stations offer traffic updates, how frequently, and which stations don't. We should also get consumer input on these positioning options in future research.

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In either case -- as a complement or alternative to radio updates -- 511 has strong claims on which to base its positioning. First among these is that 511 would report the current level of congestion along a commuter's route, and give them an estimated travel time to their destination. Instant, ongoing access to this quality of information is a major perceived advantage over radio traffic reports.

2. Positioning of Web Service versus Phone Service

- The Web-based version of 511 should be positioned differently from the phone-based version, as the different media seem relevant to different needs and usage -- As discussed, the Web was not perceived as a good source for current traffic conditions because it can't be accessed en route, the only time when such information is timely and reliable.

Conversely, the Web *was* perceived as a good medium for advanced trip planning. On these occasions, people seemed likely to be at home or at work, thinking about a trip they will take in the next few days. For unfamiliar destinations, the Web provides them an opportunity to look at a map and print directions, neither of which could be done by phone or during a commute. Ideally, a trip planning Website would provide *expected* traffic conditions (based on historic averages) and advance warning of *future* events -- as opposed to the *current* traffic conditions desired by phone or radio.

In short, information for driving *now* is better delivered by phone; information for driving *at a later date* seems better delivered via the Web.

One area of potential linkage between the phone and Web aspects of 511 is the ability to register for customized updates. Some respondents seemed quite interested in creating a personal 511 commute profile if it would let them bypass the route selection phone menu, and the Web seemed like a convenient place to register such a profile. Such a feature should be considered for future enhancement to the 511, since it would likely increase usage of the phone service and would get phone users to visit the Website (to register).

3. Target Audience

- The target audience for 511 seems potentially broader than the usage demographics for 817-1717 would indicate, and more oriented to women and middle management -- Although 817-1717 usage has seemed skewed to upper-income, "Type A" males, the focus groups indicate that women are perceived as equally likely users of 511 as men.

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Also, the self-oriented, impatient and perhaps aggressive image of a "Type A" male doesn't seem to fit with the self-perceptions of potential 511 users. These potential users characterized "everyone else" as aggressive or impatient drivers, but not themselves.

Perhaps a more flattering and accurate view of the target's self-perception with respect to traffic information is that they are trying to responsibly coordinate and meet their morning demands at the office. They are not in a competitive race against other commuters. The likeliest frequent users seemed to be people in middle management positions who interface and collaborate extensively with others within their organization. By comparison, those who work more independently, or who have more top-management flexibility to determine their work schedule, seemed like they would be less frequent users.

4. Media

- Media strategy should be re-thought -- While Outdoor can work well as a reminder medium for products that have been introduced in other media, it is extremely limited as a sole or primary medium for new product/service introductions. The low trial and awareness of 817-1717 that we see in annual surveys can be explained, in part, by the focus groups findings that few people understand the service on the basis of its billboards. Hence, we believe that because of its primary emphasis on Outdoor, 817-1717 has never been adequately introduced.

Certainly, it would help to say "traffic information" or "traffic updates" on billboards, as the focus groups respondents suggested. This alone, however, is unlikely to significantly change behaviors. Why should it, if people appear quite satisfied with the radio traffic information they already receive?

Instead, we believe the optimal solution is to favor media that permit a more detailed and involving explanation of features and benefits. In other words, more clarity, more interest, more "sell". This will be all the more important for 511, because it has more interesting features than the current service.

Also, given that interest in traffic information seems highest on weekday mornings (especially Mondays), Friday afternoons, and on rainy days, we could benefit from using

a medium that allowed a concentration on these periods. Since, at these times, Radio is the preferred source of traffic information, it probably would be the most effective medium for such time-of-day and day-of-week concentrations.

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Radio would even allow the flexibility to concentrate media on rainy days. The Swiss Miss brand effectively uses a similar strategy to promote its Hot Cocoa just in advance of winter storms, with its Radio buys triggered by weather forecasts.

5. Features to Emphasize in Advertising

- Current conditions and estimated travel time are the golden eggs of 511 features -- These features connect quickly to the core benefit of traffic information: accurately re-estimating your arrival time. Equally important, they provide a solid advantage over radio traffic reports. When these features are available on 511, they should be the central focus of its advertising.
- The benefit of voice activation should be described as a *combination* of safety and convenience -- Respondents placed a strong emphasis on both benefits, and perhaps a word like "comfort" could describe both benefits in a single, stronger idea: the "comfort" of voice activation makes things safer and easier. An important inference of "comfort" would be the emotional comfort of no longer putting yourself (and others) at risk by punching in sequences of numbers while you're trying to drive in traffic.

6. Executional Consideration for Advertising

- Creative should incorporate insights about people's feelings and behaviors with respect to traffic information -- The groups yielded insights that, if reflected in Creative, would convey that 511 really understands its target's attitudes and needs. The more the target feels understood, the more trial and loyalty we should expect. Here are what seem to be the most useful insights for Creative:
 - As mentioned in the "target" discussion, Traffic information seems most important to people who are needed at work first thing in the morning. These people seem to use traffic information services and their cell phones as a way of communicating responsibly with their co-workers. Their need for traffic information seems not just inner-directed (as in "how long will *I* have to wait"), but quite outer-directed (as in, "how will *others* be affected if I'm running late?"). Creative that validates this type of person and attitude will likely resonate with the target.

- An occasion when the need for traffic information can be particularly urgent is when a morning commuter hits a sudden, unexpected slowdown or stop, and -- having just

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missed a radio traffic report -- gets "antsy" waiting for the next update. Creative should acknowledge this feeling, perhaps with empathy or humor ... for example, an execution that features ants, or the song "What's Going On?" (These examples from the moderator are provided only to endorse the use of commuters' own words and images as starting points for Creative ideas).

- Friday afternoons are seen as a unique traffic occasion with all the SUVs going to Tahoe, especially in winter. We may want an executions that talk about this, and/or we may want to coin a mnemonic phrase like "taking a 511 Friday". For example, someone planning a "511 Friday" could mean that they're going to Tahoe -- leaving work early to get a head start on their trip, and checking for traffic and road conditions along the way. With such a mnemonic, the service would be more top-of-mind when Tahoe-bound skiers and snowboarders take to the road. From a brand perspective, the service would seem more relevant and attuned to Bay Area's lifestyles.
- Rainy days seem to remind people how spoiled the Bay Area is, weather-wise, and how sensitive its traffic is to even mildly adverse conditions. Creative that acknowledges this, perhaps in a lighthearted way, would get the target nodding in agreement -- especially people who have moved here from snowbelts across the country. As a promotional idea, we may want to consider issuing a 511-branded umbrella.
- Though not frequently contacted, CHP seems to be a gold standard for traffic information. In Creative, could we use some form of CHP endorsement of 511? Could the 511 voice persona be that of a CHP officer?

7. Coordination of Product Development & Advertising Launch

• If 511 is initially available with voice activation but without current traffic conditions, it probably should *not* be advertised until later -- To make 511 a quantum success over the current 817-1717 service, the *difficulty* of obtaining information needs to *decrease*, and the *value* of the information needs to *increase*. Voice activation alone would only solve half that requirement. Consequently, we believe that marketwide advertising at the initial voice-activation stage of 511 would only lead to trial and subsequent rejection (or low

repeat usage). Triers probably would be nonplussed by the current level of information, which -- as previously discussed -- is often too terse for the user to form a good mental picture of current conditions. We recommend that only when the information includes complete and more vivid descriptions of current traffic conditions, and estimated travel times, should the new service be launched with marketwide advertising.

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However, we *do* recommend that voice activation be deployed as soon as possible, and that the change to 511 and voice activation be communicated to current users of 817-1717.

8. Product Development Recommendations

- A system that knows automatically where and who you are seems to be in great demand; consideration of such features should be a priority for future development -- We were surprised by the level of familiarity and interest in GPS technology, and by respondents' inclination to include GPS-related features in their ideal traffic information systems. Granted, the deployment of such features depends in part on what the auto industry is planning. Those plans should be monitored, but in the meantime there is commuter interest in using Caller ID, and/or subscription-style e-mail or pager notifications, as a way to provide more customized -- and therefore convenient -- traffic reports and alerts.
- The 511 service should include a means for commuters to call in reports -- As mentioned, one of radio's perceived advantages in providing timely updates is the input received from listeners calling-in from the road. If possible, 511 should match this advantage by providing a call-in feature. This would likely increase the perceived efficacy of 511, as well as the user's sense of involvement and loyalty.

Also, as noted, the more unstressed commuters seem to want an ally who can help tame the aggression of today's drivers, and encourage a more cooperative attitude. They too might like the option to call 511, so as to report a driver who is endangering others, or to just "vent" some frustration when another driver shifts their mood from good to bad.

A final consideration is that because "511" is strongly associated with both "411" and "911", it inherently conveys the ability to both receive and provide information.

- A "next call" feature should be built into the voice activation options -- Given the target profile described previously, a 511 user who learns of a major delay is likely to call work right away. Most likely, the convenience of placing that call through 511's voice activated system would be seen as a courtesy that the service provides, and greatly appreciated.

- Traffic reports on 511 should be as visually descriptive as possible -- While in the future, a proliferation of mobile devices like PDAs will make it possible to see actual or symbolic depictions of traffic conditions, in the meantime there is the opportunity for 511 to make verbal descriptions of traffic more vivid and visual.

511 Focus Groups Findings

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As discussed, the formation of a mental picture of traffic seems important to commuters. Accordingly, details like the average speed of traffic may be more helpful than "traffic is slow". Incidents should be described in greater detail (short of gory) -- have people stopped to help? What kind of truck overturned? And so on. Though these descriptions would take up more time, they would satisfy the commuter's curiosity and ability to assess the situation. In order to provide such descriptions, pre-recorded "concatenation" sequences on voice-activated systems would be insufficient. Voice-to-text and/or spontaneous recording systems also would be needed.

For the long term, any reasonable technologies for depicting traffic conditions while commuters are en route -- whether those be personal technologies, factory-installed in automobiles, or roadside displays -- should be prioritized when those technologies become imminently practical.

- Weather information seems dispensable as a 511 feature -- Given that there was not much interest in weather information as a 511 feature, we feel it should probably not be provided. Our opinion is based on the ubiquity of weather information, the Bay Area's benign weather, and the belief that while traffic information is something you access en route, weather information is something you access before you leave the house (What should you wear? Should you take an umbrella? Etc.). If there is a role for weather, it may be as forecasts for trip-planners using the Website, or as a winter feature that includes Friday road conditions over the Sierra.

9. Role for Alternate Route Information

- A tentative assessment from this research is that alternate route information does not seem to be in frequent demand -- Respondents generally did not voice a need to use traffic information for planning alternate routes on their daily commute, nor did changing routes seem like common behavior. Instead, they seemed habituated to their routes, and more interested in knowing about the extent of a typical delay than how they might avoid it.

This assessment is tentative because it is based more on what respondents didn't say than what they did say. If future research finds more evidence that this assessment is correct, we may want to consider ways to "push" alternate route recommendations to commuters,

rather than expect them to seek it. Even so, changing behavior in this respect might take time.

Attachment A

511 Launch Planning Focus Groups - Moderator's Outline Draft #1, 7/3/01

1. Introduction (10-15 minutes)

- Welcomes/thanks
 - Topic
 - Sponsor: MTC (?)
 - My name/neutral role
 - Work as a group, listen, open opinions - can't talk to everyone
 - Videotaping
 - Viewing room behind us
 - listen in without being a distraction
 - questions
 - Excuse yourself ok, but no cell phones
 - Payment
 - Questions?
- To get started, let's pair up. Introduce yourselves to one another, then talk a little to each other about your commute. Then each of you will introduce your partner to the rest of the group.

2. Category Definition, Salience and Options (20 minutes)

- a) What is "local traffic information"? What kind of information?
- b) When is local traffic information important? (Times? Circumstances? Destinations?)
- c) What source of information is best? Why?
- d) Is the internet a good source? When? Why/not?

3. 817-1717 as an Option - **Aware Non-Users (20 minutes)**

- a) How many of you were able to use 817-1717 this past week (homework exercise)?
- b) Before trying it, were you aware of a phone number for traffic information? (probe)
- c) Do you recall seeing this billboard (show 817-1717 billboard)?

- d) What are/were your reactions to this billboard?
- e) Why had you not used this service before we asked you to?
- f) What did you think of it after trying it? (probe)

3. 817-1717 as an Option - **Users** (20 minutes)

- a) What first prompted you to try 817-1717 for traffic information?
- b) When and why do you use 817-1717 instead of another source?
- c) How do you feel about the 817-1717 service? What do you like/dislike about it?
- d) Do you recall seeing this billboard (show 817-1717 billboard)?
- e) What are/were your reactions to this billboard?

4. Usage Occasion/Relevance (20 minutes)

- a) How do you normally feel on your morning commute? Evening commute?
- b) Thinking about what you do before and during your morning commute, what stimulates you to seek, or notice, traffic information?
- c) We asked before: when is traffic information important? I want to know specifically, is it more important in the morning? In the evening? The same either way?
- d) Is your use of traffic information a routine? Or do your needs change depending on the circumstances? How so?

5. 511 as an Option (40 minutes)

- a) Pair off and "build" the ideal traffic information service.
 - What would it be like?
 - How would the information be delivered or accessible?
 - What information would be included?
 - What else would you want for it to be "ideal" (probe)?
 - Review answers
- b) Read 511 service description.
 - Handout
 - Review answers

Closing (5-10 minutes)

- What questions or final thoughts do you have?
- What type of person is 511 for?
 - Handout
- Appreciation and recap of key themes

- Good night and reminder to collect envelope on way out

Attachment B

Features of a New Phone Service for Bay Area Traffic Information

Respondents ranked the features below on a scale of 1 to 5, where "1" was "not at all important" and "5" was "Very Important". They were also asked to pick one feature they felt was most important, and explain why they picked that feature.

- "A 3-digit phone number to dial: 511"
- "Toll free within the Bay Area"
- "Voice-activated: you will be able to speak the options you select instead of pressing numbers"
- "The 'menu' of options to select from will be improved"
- "The 511 service will use new technologies to provide more complete, timely information about incidents and slowdowns along your route"
- "The service will report the current level of congestion along your route, and estimate the travel time to your destination"
- "The service will include Bay Area weather information"

